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ABSTRACT

The uses being made of the OCLC system in the area of public or reader's services was investigated in this study. Topics dealt with include the training of librarians and patrons in on-line searching, specific benefits of the data base to the public, disadvantages of the present OCLC system in public services, costs, and the motivation behind installation of public service terminals. Data were obtained from structured interviews with reference librarians at seven Ohio academic libraries and the State Library of Ohio. Findings indicate that many librarians felt that before the system can be used effectively for public services, all the holdings in their collections should be converted into the data base; and although the means for accomplishing the goal of public use of OCLC terminals varied in the libraries visited, one important similarity was found in that the majority of librarians displayed an enthusiastic attitude when discussing public use of the system. It was also felt that a greater stress on publicity and general instruction would likely involve more public use of the system. Questions presented to participants in the study, sample instruction sheets provided by libraries at public service terminals, and a bibliography are appended to the study. (JPF)

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THE USE OF OCLC TERMINALS IN THE PUBLIC
SERVICE AREAS OF EIGHT OHIO LIBRARIES

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A Master's Research Paper submitted to the
Kent State University School of Library Science
in partial fulfillment of the requirements
for the degree Master of Library Science

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TO THE EDUCATIONAL RESOURCES
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USERS OF THE ERIC SYSTEM."

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ABSTRACT

LARICCIA, LOUISE, M.L.S., August, 1976

LIBRARY SCIENCE

THE USE OF OCLC TERMINALS IN THE PUBLIC SERVICE AREAS OF
EIGHT OHIO LIBRARIES (74 pp.)

Director of Research: Ann Allen

The Ohio College Library Center's on-line system is currently being incorporated into the operations of libraries in a variety of ways, both in technical and public services. This paper investigates the uses being made of the OCLC system in the area of public, or reader's, services. The paper does not recommend policies to be followed, but examines practices which have been attempted in a number of Ohio member libraries involved with the use of OCLC terminals in public services. It is hoped that a library contemplating public access to the OCLC data base can gain some insight by examining the experiences of other member libraries already committed to that type of use.

Topics such as training librarians and patrons in on-line searching, specific benefits of the data base for the public, disadvantages of the present OCLC system in public services, cost, and the motivation behind installation of public service terminals are dealt with in this study.

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Master's Research Paper by

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B.S., Youngstown State University, 1969

M.L.S., Kent State University, 1976

Approved by

Ann Allen, Adviser _____ Date _____

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I. INTRODUCTION AND PURPOSE OF THE STUDY

The Ohio College Library Center was chartered in 1967 and set out to accomplish its goal of providing a central data base and union catalog which, it was hoped, would enable libraries to increase productivity and at the same time reduce unit costs. Since then, the Center has achieved great strides toward this goal. Over 700 libraries all across the United States have participated in building a data base of over two million bibliographic records. The Center supplies members with catalog cards tailor-made for the individual library's needs; and mails these cards to the library, pre-sorted and ready to be filed directly into the appropriate catalogs. The data base is used not only for cataloging and card production purposes, but also for pre-order searching in the acquisitions departments of many institutions. The Ohio College Library Center will someday offer an automated acquisitions subsystem package to member libraries for ordering and claiming functions. A serials cataloging and control subsystem is already on its way toward completion. At least two member libraries have input a majority of their Roman alphabet retrospective records for serials into the OCLC data base, and others are preparing to follow the lead. The Florida and Minnesota

Union Lists of Serials are currently a part of the central data base, and Library of Congress MARC-S tapes are being merged into the data base for use by member libraries.

So far, most of the major advantages of the OCLC system have been felt in technical services. A notable exception is the interlibrary loan function which takes advantage of member library symbols provided on each bibliographic record in an effort to improve borrowing and lending operations for its users and staff. OCLC has proposed plans to develop this interlibrary loan subsystem to the point where the same terminal used to locate a needed title can also be used to request it from another library.

A circulation control subsystem is in the planning stages and may eventually provide for each member an integrated means of control for all items within an individual collection. Once this subsystem becomes operational, circulation department staff members and patrons will be able to determine the exact location of any title in the library.

This paper will not discuss the cataloging, acquisitions, serials, circulation or interlibrary loan subsystem, but will focus on a relatively obscure aspect of OCLC which is beginning to show signs of coming to life. At least ten OCLC members have decided to install terminals in their public service areas, and more are planning to do the same. This is a rather curious trend since the benefits of the system for public service use at this time are debatable. Most member libraries have not yet input their retrospective

titles into the data base, so only those items cataloged, or re-cataloged, since a library's entrance into the system can be retrieved on-line. Besides Coden, ISSN, and ISBN, and LCCN, OCLC has author, author/title, and title search capabilities, but cross referencing is not possible at present. Added entry and subject access are only just beginning to be developed, and yet some libraries have had public service terminals available to their reference librarians and patrons for two or three years. Local call numbers and holdings for monographs cannot always be obtained through the CRT, yet interest in public use of the system seems to be growing.

One purpose of this paper is to examine selected aspects of the interest on the part of certain member libraries concerning public access to the system, and to present information obtained from these libraries about their experiences. How did the interest begin? What were some of the problems encountered after the decision to install a public service terminal had been made? What are some of the advantages and disadvantages of using the system in public services? What kind of planning was involved before the arrival of the machine? What were the results of the planning? What are the hopes for the future? All of these questions will be dealt with in an effort to understand the reasoning and motivation behind the emerging interest in using OCLC terminals in public services, rather than only in technical services.

Since little has as yet been written concerning the use of OCLC terminals for public services, each member library interested in pursuing the prospect would normally consider conducting a survey of current users in order to obtain helpful information for planning its own operation. This paper was written in hope that it will serve to minimize individual investigation by providing at least some of the information sought by perspective public service users. The information presented in the paper is not intended to alleviate all concern, or answer all questions about the topic, but to present data based on the experience accumulated by librarians already involved with such a project.

Limitations and Scope of the Study

Although this study was intended to include only information about the use of OCLC terminals in the reader's services or reference areas of libraries, it has been found necessary to include mention of Ohio State University's Library Control System (LCS) terminals as well. The necessity for a discussion of LCS exists because of that system's obvious impact on the library's use of the OCLC terminal. The paper will not include descriptions of, or references to, any other information retrieval systems or devices.

The study does not include discussions of any of the existing capabilities of OCLC except those directly relating to public service use. Because of repeated references to interlibrary loan capabilities by persons interviewed,

it has been impossible to omit discussion of this function from the paper. However, no attempt has been made to pursue OCLC's proposed interlibrary loan subsystem in depth. Only its present uses by reference staff in their reader's services responsibilities will be examined. The study excludes entirely any discussion of the future circulation control subsystem and circulation department use of the terminals.

Appendix III provides copies of materials which have been gathered relating to training procedures undertaken for reference librarians and users. No effort has been made to survey student opinions of the system except from the viewpoint of the reference librarian. Information of this type can be obtained from an OCLC study completed by means of a grant from the State Library of Ohio.¹

The conclusions which can be drawn from the data collected in this survey are by no means definitive. One of the most concrete statements that can be made about the OCLC system is that it is in a constant state of change. Since the study began, the system has already changed enough to make the information presented here out-of-date. The introduction of Addendum 4 to On-line Cataloging² produces many new aspects not covered in this study. The new

¹Interview with Phillip Schieber, Ohio College Library Center, Columbus, Ohio, 11 March 1976.

²Ohio College Library Center, On-line Cataloging (Columbus, Ohio State University Libraries, Office of Educational Services, 1973) Revision of pp. 29-34.

searching rules presented in the addendum are not included since the document was distributed after the study was completed. The rules and their effect on patrons could probably be the topic of a future study. All new capabilities incorporated into the OCLC system since April 1976 are not reflected in this paper, and so its contents will become more and more obsolete with each passing month. The hope is that future efforts will be made not only to expand the accumulation of information presented here, but also to investigate the impact of OCLC's evolution on public services staff and patrons.

Many studies are needed to examine the extent of assistance that can and should be given to users on prepared instruction sheets. Does the user need to be informed that entries including "United States" should be searched in a certain way? Does he need to know about the use of the circumflex (^) in a search key? Does he need to know that non-alphabetic characters are not used in constructing search keys, or that hyphenated words are considered a single word? How should librarians attempt to transfer information about the existence of new expanded capabilities to users? What effect does publicity have on the extent of public use of the terminals? How can librarians encourage more public participation in the OCLC project? How do users feel about the terminal in relation to the card catalog? How much training should reference librarians receive in machine manipulation?

The opportunities for investigation in this area of OCLC use are endless, as is the interest in future possibilities. Many libraries are committed to OCLC for their technical services operations and, while finding the capabilities of the system useful in those functions, seem eager to incorporate as many new areas as possible. In order to do this successfully, some standards need to be created. This study is being presented in an effort to introduce the topic of public service use of the OCLC system to librarians interested in this application.

Definition of Terms

BASIS-70: the name supplied to the keyword searching technique developed by the Battelle Corporation. OCLC has been working with the BASIS-70 programs in an effort to incorporate the Battelle system into its own operation. The hope is that within a few months the programs will be ready to be introduced in a controlled off-line experiment in two member institutions.

Cathode Ray Tube Terminal (CRT): the machine used in the OCLC system which has the capability of communicating alphanumeric text to and from the central computer in Columbus, Ohio. The original CRT used by OCLC member libraries and manufactured by Spiras, has been replaced in many areas by a newer model designed by staff members at the Center and manufactured by Beehive. The new model is the OCLC-100 terminal.

MARC tapes: magnetic tapes distributed by the Library of Congress which contain LC cataloging records completed in a particular week's time. The tapes are released to libraries which subscribe to them. They contain cataloging that fits specific criteria set up for inclusion, as well as revised versions of cataloging previously done by LC. Monographs, serials, films, and so on, are provided on separate tapes and can be purchased individually. The Ohio College Library Center purchases tapes from the Library of Congress and periodically merges the bibliographic information on the tapes with the existing OCLC database.

The Ohio College Library Center (OCLC): a not-for-profit corporation chartered in 1967 by the State of Ohio, with the goal of making available to members the resources of other members, and lowering unit costs for all participants.

The Ohio College Library Center's Public Use Study: a study initiated in 1975 by a grant from the State Library of Ohio in which Spiras terminals were distributed free-of-charge to seven participating Ohio libraries. In return for the machine, the libraries agreed to place the CRT in a public service area of the library for staff and patron use, and to distribute questionnaires to users. At the end of the study period, the questionnaires were to be returned to OCLC for

tabulation and study. Results of the study will be made available in a short time.

Public Services: for the purposes of this paper the term will be used to refer to any function undertaken by a member of the reference staff of a library in order to provide a user with information he or she needs. Direct contact with users in the card catalog or reader's services area is the prime concern. Behind the scenes reference functions, interlibrary loan operations, and collection development responsibilities are generally included but not stressed.

Search Codes: truncated versions of personal or corporate main entries or titles which are used to obtain bibliographic information about a particular work from the OCLC data base.

Methodology

The method for data collection employed in making this study is the interview. It was felt that an on-the-scenes visit would make possible not only visual investigation of the individual reference sites, but also in-depth examination of attitudes and opinions held by individual reference librarians. Because of the travel time and cost involved, it was found necessary to limit the area of the study to the State of Ohio, although an effort was made to include as many portions of the state as possible.

In order to facilitate later comparisons, it was felt that the libraries included in the survey should be of

nearly the same type. Since it was discovered that very few public or special libraries in Ohio have as yet become involved in any OCLC public service venture, the libraries chosen for investigation, with one exception, were all academic institutions. The State Library of Ohio was included because of its interest in the area of public access to the CRT.

It was also felt that none of the institutions involved with this study should be new OCLC members. All of the libraries included, with the exception of the State Library, have been making use of the system in their technical services areas since OCLC began on-line operations.

Eight libraries in various portions of the state were contacted and agreed to participate in the survey. These are Case Western Reserve University, Cleveland State University, Heidelberg College, Oberlin College, Ohio State University, the State Library of Ohio, Wright State University, and Youngstown State University. Five of the eight participants are state-supported institutions, and three are privately funded. The holdings of the eight libraries range from just over 100,000 volumes to over three million volumes.

At each institution, at least one member of the staff involved with that institution's public access operation was interviewed. In most cases, the interview began with department heads and, in some instances, progressed to other members of the library's staff. The lengths of the

interviews vary from one to two hours, and an examination of the terminal site was made in each library. The interviews were conducted using a prepared list of questions³ designed with the hope of obtaining as much insight into each particular situation as possible.

Of the eight institutions, five actually had OCLC terminals operating in their reference areas at the time of the visit. One of these had four public service terminals in its two main libraries, and was using three and one half of them for reference staff and the public. The remaining time was used by staff members doing serial check-in.

One of the three libraries without CRTs at the time of the interview had had a terminal in its reference area for several months, but because of internal priorities, relinquished it to technical services. The two remaining libraries without public service machines expect installation within the next few months.

Two of the eight libraries included in this survey will probably be receiving additional public service terminals for their expected participation in OCLC's controlled subject access experiment some time in the future.

The information received through these interviews has been recorded and will be presented in the following pages. In an effort to comply with requests for anonymity by several participants, the results of the interviews are

³See Appendix I, pp. 43-46.

discussed without direct reference to the person interviewed. A list of participants and their institutions, however, is available in the Bibliography of this paper. It should be kept in mind that the focus of this study is not a descriptive analysis of each particular library included. The aim is to introduce and examine various aspects of public service use of OCLC terminals and identify any trends in these individual areas of concern. Therefore, the contents of the paper are divided by topic of concern, not by institution.

II. RESULTS OF THE STUDY

The Decision to Invest

The first question put to the persons interviewed in this study concerns their reasons for initiating the installation and use of terminals for public service purposes. The responses demonstrate a common belief among library administrators that the OCLC system, once its full potential is reached, will provide public services never realized through the use of the card catalog. Several participants stated that the addition of proposed capabilities would probably make the terminal a far more useful and efficient tool for information retrieval than is the card catalog. Two librarians went as far as to state their intention to replace the card catalog with CRTs as soon as it is feasible to do so. The decision to install a terminal at this early date was made, in the majority of cases, in an effort to prepare and familiarize the public and the staff with this new tool. Two of the eight participants enjoy special advantages through the system due to the fact that nearly all of their monographic holdings have been converted (or nearly converted, in one case) into machine readable form and are available on the CRT.

Three of the eight participating libraries received their public service terminals free-of-charge as a part of

the study initiated by OCLC on the impact of the terminal on the public. Only one of these three institutions decided not to retain its terminal for public service use after the study had been completed. This decision, however, does not reflect a disenchantment with the machine itself, only a more pressing need for it in the technical services area of one of the library's branches. Only one of the three administrators of these institutions stated that had it not been for OCLC's use study, a CRT would probably not have been purchased until additional capabilities were made available. This particular institution, however, has access to a circulation control system which already supplies users with information the OCLC system cannot supply at this time.

In none of the institutions did it seem evident that the reference librarians themselves were responsible for the decision to install public service terminals. This is not to imply that the reference librarians were opposed to the idea or that they were not involved in planning for installation and use. As a matter of fact, most reference librarians interviewed had been accessing the technical services CRTs before their own terminal was installed.

Use of the System—Who Uses the Terminals?

In five of the six libraries with existing public service terminals, patrons are encouraged to use the machines as much as possible. Public use is promoted in a variety of ways. In many cases the terminals are placed

in a location more convenient to the public than to the reference staff; the instructions for use are easily accessible to patrons and have been created with the novice in mind; and, patrons are informed that the staff is always ready to assist in the event that a problem should occur.

Almost all of the librarians in these five institutions, however, agree that staff usage seems to predominate. Statistical verification of this impression is not available at this time, but several participants revealed plans to study usage more closely in the future. One librarian mentioned the fact that the very nature of his particular library accounts for heavy staff usage. In this library, most of the requests for assistance are phone requests rather than personal visits. Those patrons who do actually come to the library, however, are encouraged to use the CRT.

In only one library is terminal usage intentionally limited to staff members, although curious students are not prohibited from experimenting. This arrangement appears to have evolved from the discovery that staff needs on the CRT absorbed most of the available time. However, the administration of the library has hopes of acquiring an additional CRT to be devoted solely to public use.

Both of the remaining two institutions, who expect installation of terminals in the near future, have plans to involve students in using the terminal as much as

possible. The degree of student and staff participation cannot, of course, be predicted.

Use of the System--How are the Terminals Used?

At some time in the future, reference librarians will be using the OCLC terminals to search for items using keywords; to call up a title on the CRT and determine its exact call number and location in the library; to inform users that individual titles being sought have been checked out or sent to bindery; and to initiate automatic requests for loan from another library if the needed item is not in the collection. These capabilities are not available at the present time, so the question of what uses of the system are currently made was put to the librarians interviewed. The two most commonly used answers were that the CRT is being used to verify entries and titles, and that it is being used to locate titles not available in the library's own collection.

In the first instance, librarians stated that students often ask for titles without knowing the exact information needed to search in the card catalog. The abbreviated algorithm approach used on the terminal very often provides the exact information needed for a more successful search in the card catalog. Reference staff members who are responsible for book selection and interlibrary loan operations also use the CRT to verify entries and other information.

The second most prevalent use of the system--that of locating books in other libraries--seems to be the most highly praised capability. If the library does not have the needed title, a check on the terminal can either provide the information that a nearby library has the book (in which case the student has the opportunity of visiting the library and obtaining the book), or that the title can be obtained through the interlibrary loan department.

Two librarians stated that they also use the system for a sort of "pseudo-subject" access. By calling up certain topics using the title search key approach, these librarians found that they could sometimes retrieve titles about that topic. A perusal of the subjects supplied on the screen record could give clues to areas in the card catalog which could be checked for more information.

Reference librarians responsible for book selection, besides using the terminal to verify entries, use it to obtain information about publishers, prices, and so on. They also query the data base to determine whether a title has actually been published. In contemplating purchasing a book that is relatively expensive, librarians found that a check on the terminal sometimes made actual purchase inadvisable since the book was available at a nearby institution. Some librarians mentioned that they sometimes use the MARC tapes supplied on-line in place of searching through all the recent supplements of NUC for bibliographic information needed in book selection duties.

Other uses mentioned by reference librarians interviewed include the ability to locate varying editions of books and to locate items that turn out to be in a form other than the form expected from the original inquiry (a government document was given as an example).

Direct patron use of the CRT leans heavily toward the function of locating books not in their library's collection. In one particular institution, students have begun to query the terminal before going home for vacations in order to establish the presence of a book in their home town library.

The practice of using the terminal to verify entries is also employed by patrons.

Quite often, according to reference librarians, the students use the terminals just to practice, or experiment, even though the information they want can easily be found in the card catalog. There was no indication given in any of the interviews that students tend to shy away from the machines or express fear of them. In fact, in the library which gave up its terminal to technical services, many students requested its return.

Other operations performed by patrons on the terminal include obtaining exact author, title and publisher information for citations needed for research papers, and verifying entries or titles for more successful searches through the card catalog.

Disadvantages of the OCLC Terminal
for Public Service Use

Several major disadvantages in the existing OCLC system were brought out in discussions with public service staff members. One disadvantage mentioned repeatedly was the lack of subject access to the data base. Although all reference librarians interviewed shared the feeling that a subject search capability is imperative, very few were familiar with BASIS-70 and OCLC's attempts to incorporate it into the system. At the department head and administrative level, however, recognition of the project was more apparent. When asked their opinion of keyword access to OCLC records, all reference librarians agreed that if approached correctly, the use of keywords would provide an effective means of accessing information from the OCLC data base. Many expressed the opinion that relying on LC alone would present problems because LC subject headings are often obscure and outdated. Some librarians mentioned the difficulties that would be involved in training students to search by keywords. They believed that librarians would be called on much more for assistance than they are now, but that final results would be more beneficial to the student.

One problem mentioned by five of the eight participants in this study was that not all titles owned by the library are listed in the data base. For this reason, librarians in these five institutions considered it more efficient to consult the card catalog first in any effort to determine whether a particular title was in the

collection. The terminal is consulted only if this initial step proves not to be fruitful.

One of the three remaining libraries finds no need for its holdings to be reflected in the OCLC data base because of its own local circulation control system. The two other libraries do not feel the matter to be of major importance: one because its monographic holdings have already been entered into the system, and the other because its monographic conversion project is nearing completion and the majority of its holdings can be accessed through the CRT. In both these libraries, a search of the terminal for any title would reveal the presence or absence of that title in the library's collection.

Seven of the eight librarians agreed that local call numbers and detailed holdings must be made available before the system can be effectively used for public service purposes. However, some librarians found it to be more of a problem than others. The library with its own circulation control system did not, of course, feel a need for local call number availability through the OCLC terminal, since all local call numbers are provided by their own system. Two other libraries find that the call numbers provided on the screen are very close to the call numbers on their books in a high percentage of cases. One of these two institutions has even issued instructions to users that if the item sought cannot be found under the exact call number listed on the screen, they should check a few shelves

above and below that call number. The librarians of these institutions feel that a majority of the materials sought are found in this way. One librarian at another institution stated that lack of local call number availability is one of their major complaints. Reference librarians found that they could use the system to determine if an item is in the collection, but had to use the card catalog to determine its exact location. In order to eliminate a duplication of effort and save time, these librarians have decided that it is more productive to consult the card catalog first in most cases.

One reference librarian expressed an opinion that holdings symbols provided at the end of OCLC records be in alphabetical order so that students and staff members need not sift through countless numbers of symbols to retrieve their own local holdings. Another librarian mentioned that the system should be constructed in such a way as to display an individual library's holdings first. If there are no local holdings available, the librarian could ask for holdings of other institutions.

Instruction in the Use of the
System--Reference Staff

Each library included in this study seems to have had a different approach when it came to the methods used to train reference librarians to search on the CRT. The following discussion of training techniques will include

individual descriptions of each institution's attempts along these lines.

The first institution to be discussed does not as yet have public service terminals, but the reference librarians in this library already know how to search on the terminal. They have been using the CRTs in the public service area to verify information and to identify titles in the collection almost since the system began. The reason for this early interest on the part of the reference librarians lies in the fact that most of that library's collection is already on-line. Training of reference librarians took the form of classroom as well as individual instruction, and was conducted by the head of the technical services division. In these sessions, librarians learned not only searching techniques, but enough tagging procedures to enable them to identify information contained on the screen. Although the staff members in the reference area of this library are not acquainted with the fine points of input and cataloging operations, they are aware of some of the manipulations that can be done on the machines. None of the librarians has attended OCLC meetings in Columbus, but they are kept up to date on recent developments and upcoming capabilities through memos and newsletters circulated by the head of the technical processing department.

In the second institution without a CRT in the reference area, the situation is slightly different. The head of the reference department has been taught to search on

the CRT by the head of the catalog department, but the rest of the reference staff has not as yet been trained. Training will be provided by both the head of the catalog department and the head of the reference department when the public service terminal arrives. No efforts have been made to train individual reference staff members because of the realization that they would have little opportunity to develop their skills on technical services machines. The training planned for these librarians includes basic instruction in searching procedures, but no instruction in tagging and input operations. Only the head of the reference department has attended OCLC meetings, and she informs the reference staff of developments. Newsletters are routed through the department regularly.

In the first of the libraries that already had a public service terminal at the time of the interview, the reference staff had been instructed in searching procedures by the reference librarian in charge. A multi-page instruction and information booklet, prepared by the head of technical services, is available for continuing education and practice, and most of the reference staff members have developed their knowledge of searching techniques by using this booklet. Although the members of the reference staff have never attended OCLC meetings, they have been on a tour of the OCLC headquarters.

In the next library to be discussed, reference librarians are aware of the searching techniques despite the fact

that they are not the ones who man the information desk in the reader's services area. This station is occupied by technical services volunteers. This arrangement was implemented for several reasons: firstly, because of the theory that the people who actually create catalog card information are best able to help users locate that information in the card catalog; secondly, because this opportunity helps technical services librarians fulfill a function as an instructor of students; and finally, because the existing personnel in the reference department were unable to absorb the load of student inquiries as well as performing behind the scenes obligations such as creating bibliographies. The technical services staff members who attend to student inquiries in this library have been made familiar with machine operation through their technical processing functions.

In another library regular training sessions are held throughout the year in an effort to keep reference staff members up to date on OCLC and its development. The sessions are held with eight or ten persons attending at one time by an administrative assistant in the library. The original training was done in conjunction with the head of the reference department. The reference librarians have not attended meetings in Columbus in the past but, according to the person interviewed, may be asked to attend when the public services task force comes into being. Newsletters are distributed to each member of the reference staff.

In one library, no formal training sessions were held for reference librarians. An instruction sheet was distributed to them by OCLC as a part of the public use study when the terminal arrived, and each member of the department learned to search on the terminal by using this sheet. Skill was developed through practice. None of the members of the reference staff was attended on OCLC meeting in Columbus.

The reference librarian in the next institution was taught searching techniques, but not machine manipulation, by the staff in the catalog department. Through use of the system, the reference librarian has developed the skills necessary to query the data base. This librarian receives OCLC newsletters but has not attended any OCLC meetings.

In the last library visited in this study, the librarian interviewed stated that the reference staff had known how to search on the CRT since the system began on-line operation. Through use of the terminals in the technical services area, the staff had already gained a great deal of experience and the installation of a public service terminal tended to merely provide a degree of convenience. The public service terminal in this library was installed by a member of the OCLC staff, who provided librarians with information about the author search capability which was being made available at that time.

Instruction in the Use of the System--Patrons

As a part of the OCLC public use study, Spiras terminals were installed in the public service areas of seven Ohio libraries. Along with the terminal each library received a three page document entitled "Terminal Operating Instructions"⁴ which was written by a member of the OCLC staff.⁵ This document was to be made available at the terminal in order to assist patrons in performing searches on the CRT.

The first part of the document briefly describes the availability of member library symbols at the end of each record; identifies the specific symbol of the individual library; and, mentions the fact that if titles published before 1971 cannot be located on the CRT, the card catalog should be consulted. The document proceeds to describe basic title, author/title, and author searches, and provides several examples for each type of search. The description of the various search keys is followed by a section entitled "Additional Instructions and Suggestions," in which the extended search procedure is briefly illustrated. In this section the user is also informed of what to do in case an error in typing is made, how to display each screen of a multi-screen record, and how to clear the

⁴A copy of this instruction document is supplied in Appendix III, pp. 48-50.

⁵Interview with Phillip Schieber, Ohio College Library Center, Columbus, Ohio, 11 March 1976.

screen. The document supplies a short list of codes of some member libraries, and ends with a brief description of the OCLC system. For further assistance, patrons are instructed to see the reference librarians.

The instructions for operation of the terminal provided in this document are brief and elementary. The brevity is probably necessary in order to insure clarity and simplicity for the novice searcher. However, it would seem that the patron would quickly outgrow this introductory document. Many functions and principles are not explained at all. For example: no mention is made of the fact that subtitles are not to be included when formulating a title search; the availability of ISSN, ISBN, LCCN and CODEN search capabilities is not included among the search key descriptions; and, there is no indication of the concept of "most specific" and "least specific" searching. The section on "Additional Instructions and Suggestions" does inform the searcher of the "yes" and "no" function for extended searches involving more than fifty items, but does not provide any explanation or description of collective entries. The fact that extended searches are sorted by author no matter which search key was originally used, is not mentioned. The document seems to be intended only to guide the patron in the right direction. The development of expertise in searching would require assistance from the reference librarian.

The first library included in this present study makes use of the OCLC operations document, but has incorporated some minor modifications into their version of it. The statement "type in first one or two letters of next three words [of the title] . . ." was replaced by "type in first one or two letters of the next two words . . . then type the first letter of the fourth word (if available)."⁶ Another alteration made in the second document is the addition of a section describing the log-in procedure. The section on "Additional Instructions and Suggestions" was shortened by excluding the example for the "numbered list," and the description of the "ps" (previous screen) function. With the exception of the changes mentioned above, the operation instruction guide is identical to the one provided by OCLC.

In another institution the instruction sheets made available to the patrons are also basically similar to the ones developed by OCLC, but the alterations are a bit more radical.⁷ The log-in procedure, the description of "home position" and the "clear page" function are grouped together under a heading entitled "General Instructions." The format of the individual search key description was altered quite a bit, but many of the same examples were used to

⁶See Appendix II, p. 48 and p. 51--Section 4 of heading "To Locate a Book Using TITLE ONLY."

⁷See Appendix II, pp. 54-56.

illustrate various searches. Explanations of LCCN and ISBN searching was added in this document, and stress was placed on the exact number of commas necessary in each type of search. Rephrasing of statements made in the OCLC document can be noted throughout the searching guide.

The next instruction document to be discussed is a commercially printed brochure prepared by the same institution which developed the operating guide described above. The brochure, which is distributed to all incoming freshmen at orientation classes, contains more detailed information about the OCLC system than any of the other documents examined in this survey. The first section consists of a brief description of the history and operations of OCLC. A visual representation of both the screen and the keyboard follows with identification of important areas such as the cursor, the position of the author and title fields, the location on the screen of member library symbols, and the DISPLAY RECORD and SEND keys. The brochure explains the log-in procedure and describes each individual search key. A list of member library symbols is included at the end of the brochure. Although the document is out of date⁸ it provides much helpful and explanatory information for new students.

In the third library to be discussed the operation manual provided for the patron is a xerox copy of a portion

⁸See Appendix II, p. 57.

of the brochure just described. Only a part of the visual representation of the keyboard and the screen appears, but the entire section on searching procedures is included. The general introduction and the partial list of member libraries is omitted.

The next library provides for its staff a booklet composed of a number of sections xeroxed from OCLC newsletters and handouts.⁹ The data provided in this booklet (which is kept in a drawer at the terminal desk) begins with the statement that all search keys should be tried before giving up on a search. Also included are: a section of the newsletter announcing the elimination of subtitles from title searches; an explanation of action to be taken if the lock light remains lit for more than five minutes; a detailed explanation of all possible variations of algorithms in the different searches; and, OCLC's description of the use of the circumflex (^) in searches. Examples of ISBN, ISSN, and CODEN searches obtained from OCLC newsletters are given, and a xerox copy of the commercially prepared brochure previously described is included at the end of the booklet.

The instruction sheets available in the last two libraries which already have OCLC terminals, are linked in that one is a modified copy of the other. The original document was prepared by three members of the library

⁹See Appendix II, pp. 59-64.

staff.¹⁰ In it, some differences from other documents collected for this study can be noted. The step-by-step descriptions of the searching operation seem to advance the novice searcher through the various levels in a more systematic manner. The section on title searches (which includes instructions to leave out all punctuation and shows what to do if numeric characters are included in a title) explains the possible results of the search and prescribes action to be taken in each case. For example: a search key may produce a multi-screen response, in which case the searcher must use the "ns" (next screen) and "ps" (previous screen) functions; the response might be a display of a series of truncated entries, in which case the searcher must choose the appropriate title from the list; or, the response may be that the data base cannot produce a record matching the algorithm entered, in which case the searcher should proceed to the author title/search. Although this operation manual uses outdated search key structures, a copy of OCLC's "New Search Key Structures" memo is attached at the end updating the information in the document.

The final document to be discussed is based on the one described above, except that the new search key information was pencilled in by the reference librarians in order to keep the operation guide as brief as possible for the

¹⁰See Appendix II, pp. 65-69.

users.¹¹ Other alterations from the original guide were also made in an effort to respond to the needs of the individuals at that library.

In the libraries which have not yet received their OCLC terminals for public services, plans are now being made as to the type of sheets to be provided. One of the two libraries intends to adopt the commercially produced brochure described earlier in this section. The other has plans to create its own operation manual including not only basic information, but also a certain amount of detailed description relevant to searching operations. This manual will be the result of a joint effort on the parts of staff members in both public and technical services.

Copies of the complete listing of OCLC member libraries are, or will be, available at the terminals of all of the libraries discussed in this section.

Costs of the System for Public Service Use

According to information received from a member of the OCLC staff,¹² there are several charges involved with public service terminal installation and use. The major cost is the price of the machine itself. Public service terminals must be purchased outright; they cannot be leased the way technical services machines usually are. The price

¹¹See Appendix II, pp. 70-72.

¹²Interview with Phillip Schieber, Ohio College Library Center, Columbus, Ohio, 13 April 1976.

of an OCLC-100 terminal is \$3,700. A Spiras terminal sells for about \$1,500. Both machines have all the capabilities necessary to perform cataloging and card production functions. There are hopes that a slightly cheaper terminal will eventually be developed which could handle searching functions, but not the more sophisticated cataloging operations. As yet, this type of terminal is not available to OCLC members. When it becomes available, terminals for public service use will probably be much less expensive, and the possibility of purchasing them in larger quantities will be more realistic. Once the OCLC system has been developed to its full potential, the necessity for a large number of terminals for the public, and for branch library installations, will be felt more keenly than it is now.

Another charge involved with installing a public service terminal is the cost of installing the interface which links the CRT to the central computer. This cost was quoted to be \$235.34 by a member of the OCLC staff. Once the interface, or MODEM, has been installed and the terminal begins to be used, phone line charges are applied for the lines which carry the messages to and from Columbus. These phone line charges total to about 84 dollars a month. Terminal maintenance charges constitute the remainder of the fee and amount to about 47.50 per month.

The final charge is applied after installation has been completed and the terminals begin to be used. This charge is 2.2 cents for every search key search made on

the terminal. Once the actual search has been initiated, no additional charges are made for the examination of individual records received in response to the original search. The charging system for searches is scheduled to begin in July 1976 for all terminals designated by OCLC as public use terminals. They will not apply to any searches made in conjunction with cataloging or card production operations. The 2.2 cent charge will be applied to every search key search up to a maximum of \$2,280.00 per year per terminal. All searches initiated after this maximum charge has been reached, will be free.

In discussing charges and costs with individual reference librarians, it was discovered that very few of them actually knew what the charges would be. The general feeling which was created from cost discussions is that it is too early to tell exactly what the effects of the search charges would be to each individual library. Several administrators stated that their libraries would be well over the maximum charge and would be prepared to absorb it. They felt that reference librarian use of the system would undoubtedly reach the \$2,280 maximum, and so all patron searches would be free of charge. Only one reference librarian mentioned any great concern about the search charges. This concern extends to the point that the librarian hesitates to make use of the terminal unless fairly certain that adequate results could be derived from its use.

Publicity

The amount of publicity employed by individual libraries in an effort to introduce patrons to the OCLC terminal varied from institution to institution. The two libraries whose first public service terminals are still on order stated that no specific plans had as yet been made concerning general announcements of the new capability. One of these libraries, which will be involved in the pilot project of the BASIS-70 program with its scientific materials only, does plan to hold OCLC orientation lectures and demonstrations for students in science classes when the machine arrives. Both libraries contemplate submitting articles to the school paper.

Of the libraries with existing public service machines, one placed an announcement in an information bulletin sent to selected users. The announcement stresses the CRT's interlibrary loan possibilities and states that this capability will tend to improve the library's service. Another not only placed articles in the city and school newspapers, but distributes brochures at freshman orientation classes explaining the system and its use. One institution sent announcements to its faculty members, but not to its students.

Three of the six libraries with OCLC terminals currently being used in their reference departments have not advertised the availability of the system at all to its students. Librarians in these institutions stated their

feeling that the mere presence of the CRT and the staff's use of it, creates enough curiosity on the part of library users that there is no need for formal advertising.

Location of the Public Services Terminals

Another means of publicizing the addition of a CRT to a reference area is the location of the terminal in that area. It was found that seven out of the total nine existing reference CRTs are located in a place easily seen from the entrance to the area. In one case the machine is visible from the circulation desk only, but it is felt that because of pamphlets and newspaper announcements, users have no difficulty in locating the machine when they need it. In another case the CRT is located near existing machines which are already familiar to the users. Both of the libraries awaiting installation of terminals have plans to place them in such a way that the public can see them as they enter the reference area. The prevalent stream of thought is that an ideal location is one that is convenient both to the reference librarian and to the patron. In many institutions, the user has a slight advantage. One of the eight libraries visited has issued instructions to its reference librarians that a catalog record should be visible on the screen at all times so that patrons become more aware of the machine.

An interesting question concerning the effects of having a chair available at the terminal was raised by one of the librarians interviewed. Would the presence of a

chair lengthen an individual's visit to the terminal or would it merely provide needed comfort? As yet this question cannot be answered adequately since the full potential of the system has not yet been realized. The librarian who brought up the question has decided to provide a chair at the terminal. In three other institutions, the terminals are placed on regular desks with chairs available. In one library, users must stand to make use of the terminal, while in another, the CRT is on a counter with two non-OCLC terminals and one stool is available.

III. CONCLUSION

The initial decision to install OCLC terminals in public service areas was made, in all cases, at the administrative level in each of the libraries included in this study. In none of the cases examined did a request for an OCLC terminal originate in the reference department itself, although some reference staff members were already accustomed to searching technical services CRTs. This discovery is not surprising in view of the fact that the OCLC system is not yet able to satisfy some of the demands which would normally be placed on it by public service operations. Although many reference uses can be made of the system as it exists today, it is evident from discussions with librarians that the major advantages of the system will be felt in the future when more capabilities needed in reference work have been incorporated. In an effort to prepare staff members and users for this future time, library administrators are introducing terminals into public service areas now.

Before the system can be used effectively for public services, many librarians feel that all holdings in their collections should be converted into the data base. Once this is done, the Center will need to make available to individual libraries their local call numbers and detailed

holdings information on-line. Otherwise the terminal will always remain a fringe benefit in reference departments instead of a necessary tool. Reference staff members interviewed in this study seemed to share a belief that the future of OCLC in public services holds great promise. Others prefer to wait and see what happens before making such a statement.

Instruction in the use of the system, for reference librarians as well as for patrons, is a vital concern in the success of the venture. The availability of needed information in the data base is useless without the ability to retrieve that information through adequate searching methods. There is evidence that in many of the libraries visited, the problem of training people to search on the CRT has not yet developed into a systematic, formal program which includes all aspects of terminal use (including costs involved). Many librarians learned to use the CRT from instructions sheets which related only basic principles of searching. Although these instruction sheets may be adequate for beginning searchers, detailed descriptions of searching techniques are perhaps more necessary for the reference staff. It has been impossible during the course of this study to ascertain the exact meaning of the phrase "I know how to search on the OCLC terminal." The technique is not as easy to develop as might be imagined. Formal, systematic programs of instruction will be even more necessary as system capabilities expand.

The use of the system by patrons of a library is, of course, the most crucial topic in any discussion of public use of OCLC terminals. Introducing a new library tool to the public and encouraging patrons to make use of this new tool is a demanding and full-time responsibility. Although the methods for accomplishing this goal varied in the libraries visited, one important similarity was found in that the majority of librarians displayed an enthusiastic attitude when discussing public use of the system. This kind of attitude on the part of the reference staff is important to the user and is vital to any effort to encourage user participation. It is felt, however, that a greater stress on publicity and general instruction would help to involve even more patrons. An expanded advertising and information program was found to exist in only one of the five institutions with existing OCLC terminals in the reference area of the library. As the system becomes more useful to the patron and the reference librarian, knowledge of the system should not be left to chance. This is especially true in view of the fact that several library administrators are already considering replacing the card catalog with OCLC terminals in the future.

None of the libraries involved in this study (with the exception of those which participated in OCLC's public use study) seems to be attempting to evaluate the effectiveness of the instruction sheets provided at the terminals in order to revise and update information to suit the needs of

the patron. Few definite plans for independent surveys of use were discussed during the interviews. This observation, however, is not a surprising one in view of the novelty of the venture. The enthusiasm and interest expressed by a majority of librarians will probably remedy this situation in a short time.

The concept of public use of OCLC terminals is still in its infancy. There is much to do and even more to learn about this new area of development. Reference librarians do not enjoy the benefits of attending regular OCLC meetings to discuss their venture as did technical services librarians when on-line cataloging became operational. There is no standard manual for use issued by OCLC for public service participation in the system. But through the efforts of a few pioneers, perhaps adequate knowledge of future needs will be gained so that when needed capabilities are incorporated, reference librarians and patrons alike will be ready to make effective use of the OCLC data base for public services.

Appendix I .

Questions Presented to Participants in the Study

LIST OF QUESTIONS FOR LIBRARIES WITH
EXISTING PUBLIC SERVICE TERMINALS

1. Why was the decision to install public service terminals made originally?
2. How long ago did the machine arrive in the public services area?
3. How was the decision made concerning the actual location of the machines?
4. Does the present location seem satisfactory? Why?
5. Was there any publicity about the installation of the machines?
6. Who makes more use of the terminals--students or reference librarians?
7. Who was responsible for the instruction provided in teaching reference librarians how to search on the CRT?
8. To what extent were the reference librarians trained in the use of the machine?
9. Have reference librarians ever attended the OCLC meetings in Columbus?
10. If students use the machines, how are they instructed as to correct usage?
11. If there is an instruction sheet of some kind to aid the students in the use of the terminal, by whom was it constructed?
12. How is the present information sheet for student use being evaluated?
13. Has the library's collection been converted to OCLC?
14. What are the problems, if any, resulting from lack of total holdings on the CRT?

15. What are the reactions, if any, to lack of subject access?
16. What are the feelings about the proposed OCLC subject access?
17. Are there any problems resulting from the non-availability of local call numbers?
18. What are the feelings about the cost incurred by use of the system?

LIST OF QUESTIONS FOR LIBRARIES WITHOUT
EXISTING PUBLIC SERVICE TERMINALS

1. Are any plans being made at the present time to install OCLC terminals in public service areas?
2. Did the lack of holdings affect the decision on the installation of OCLC terminals?
3. Is the lack of subject access a drawback to effective use of the system?
4. What are the feelings about the proposed subject access plan of OCLC?
5. Have you had occasion to discuss public service use of the system with any libraries that already use it?
6. Do the reference librarians ever use the terminals in the technical services area?
7. For what do they use it?
8. Does the reference staff receive OCLC newsletters?
9. Have any members of the reference staff attended OCLC meetings in Columbus?
10. Have any studies been made about the best location for the future machines?
11. Who will have access to the system--reference librarians or students?
12. Are there plans to advertise the existence of the machines once they arrive? How?
13. What kind of instruction have the reference librarians had, or will they be getting, in the use of the machines?
14. If an instruction sheet is planned for student users, who will construct it?
15. What kind of instructions will the information sheet have?

16. How do you feel about the charges which will be imposed on the library for public service access?

Appendix II

Samples of Instruction Sheets Provided at
Public Service Terminals in the Survey

TERMINAL OPERATING INSTRUCTIONS

This terminal is linked to a computerized catalog. By following easy instructions you can use the terminal to obtain information about books.

The information you will get on the terminal screen is the same as you would find in a card catalog. The terminal will also furnish you with a list of libraries that have the particular book you are looking for. This list appears at the end of a catalog record and consists of a three-letter symbol for each library. Your library's symbol is OHI.

Most of the books in this computerized catalog were published since 1971. For books published before 1971 you should check your library's card catalog if you cannot locate the book with this terminal.

To locate a book using TITLE ONLY:

1. Make sure blinking rectangle (cursor) is at top left corner of terminal screen. To move cursor to correct starting position, tap key marked "Home" (right of keyboard). If you wish to "erase" or clear the terminal screen, depress "Control" key (lower left of keyboard) and at the same time tap key marked "Clear Page" (right of keyboard).
2. Type in first three letters of first word of title (exclude a, an, the). (It is not necessary to use capital letters.)
3. Type in a comma (key immediately to right of letter "m").
4. Type in first one or two letters of next three words, separating each word segment by a comma.
5. Tap key marked DISPLAY REC'D, then tap key marked SEND. (Both keys located in upper left section of keyboard.)

A TITLE ONLY search should look like this: XXX,XX,XX,X (X's are the letters you typed).

Examples: Guide to Exposed Concrete Finishes: gui,to,ex,c
The Godfather: god,,,
War and Peace: war,an,pe,

To find a book using AUTHOR/TITLE:

1. Make sure blinking square (cursor) is at top left corner of terminal screen. To move cursor to correct starting position, tap "Home" key.
2. Type in first four letters of author's last name.
3. Type in a comma.
4. Type in first four letters of first word of title (exclude a, an, the). You may enter fewer letters if first word of title does not contain four letters.

5. Tap key marked DISPLAY REC'D, then tap key marked SEND.

An AUTHOR/TITLE search should look like this: XXXX,XXXX (X's are the letters you typed).

Examples: Michener's Centennial: mich,cent
 Tolstoy's War and Peace: tols,war
 Churchill's Closing the Ring: chur,clos
 Rust Hill's How to Retire at Forty-One: hill,how

To find the works of an AUTHOR

1. Make sure blinking square (cursor) is at top left corner of terminal screen. To move cursor to correct starting position, tap "Home" key.
2. Type in first four letters of author's last name.
3. Type in a comma.
4. Type in first three letters of author's first name.
5. Type in a comma.
6. Type in middle initial (if known).
7. Tap key marked DISPLAY REC'D, then tap key marked SEND.

An AUTHOR ONLY search should look like this: XXXX,XXX,X (X's are the letters you typed).

Examples: Jules Verne: vern,jul,
 Winston Leonard Churchill: chur,win,1
 Norman Mailer: mail,nor,
 P. G. Wodehouse: wode,p,g

These procedures will locate books in the computerized catalog written by the particular author you requested.

ADDITIONAL INSTRUCTIONS AND SUGGESTIONS

The screen display will sometimes have a numbered list. If this happens, simply type the numeral you wish to examine, hit DISPLAY REC'D and SEND. Example: The screen display shows twelve entries and you wish to see the seventh. Type: 7, and then the keys DISPLAY REC'D and SEND.

If the screen display says "Screen 1 of 2," to examine the next screen simply type in "ns" and then hit the keys DISPLAY REC'D and SEND. To examine previous screen, type in "ps" and then hit DISPLAY REC'D and SEND.

If the computer asks you a question, you can answer "yes" or "no" simply by typing either "yes" or "no" on the screen, then tapping the key marked SEND.

IF YOU MAKE A MISTAKE WHEN TYPING, simply move blinking square to letter or space you wish to change and type in the correct character. To move cursor in any direction, tap keys marked with arrows (lower right of keyboard).

If someone before you has left information on the screen and you wish to clear the screen before you begin, simply tap the key marked CONTROL at the lower left of the keyboard and at the same time depress the button marked CLEAR on the right-hand side of the keyboard. This will clear the screen for you.

IF YOU NEED FURTHER ASSISTANCE, ASK YOUR LIBRARY STAFF - they will be glad to help you.

Partial list of Library Codes appearing at the bottom of the screen

OUN - Ohio University
TLM - Toledo Public Library
DMM - Dayton Public Library
OHI - State Library of Ohio
OSU - Ohio State University
CWR - Case-Western Reserve University
OBE - Oberlin College

The library staff hopes you have enjoyed using our electronic catalog. Our terminal, along with over 440 other terminals in libraries in 30 states, is linked to a computerized catalog operated by the Ohio College Library Center, a non-profit corporation based in Columbus, Ohio.

TERMINAL OPERATING INSTRUCTIONS

This terminal is linked to a computerized catalog. By following easy instructions you can use the terminal to obtain information about books.

The information you will get on the terminal screen is the same as you would find in a card catalog. The terminal will also furnish you with a list of libraries that have the particular book you are looking for. This list appears at the end of a catalog record and consists of a three-letter symbol for each library. Your library's symbol is _____.

Most of the books in this computerized catalog were published since 1971. For books published before 1971 you should check your library's card catalog if you cannot locate the book with this terminal.

To locate a book using TITLE ONLY:

1. Make sure blinking rectangle (cursor) is at top left corner of terminal screen. To move cursor to correct starting position, tap key marked "Home" (right of keyboard). If you wish to "erase" or clear the terminal screen, depress "Control" key (lower left of keyboard and at the same time tap key marked "Clear Page" (right of keyboard).
2. Type in first three letter of first word of title (exclude a, an, the). (It is not necessary to use capital letters.)
3. Type in a comma (key immediately to right of letter "m").
4. Type in first one or two letters of next two words, separating each word segment by a comma. Then type the first letter of the fourth word (if available).
5. Tap key marked DISPLAY REC'D, then tap key marked SEND. (Both keys located in upper left section of keyboard.) ***

A TITLE ONLY search should look like this: XXX,XX,XX,X (X's are the letters you typed).

Examples: Guide to Exposed Concrete Finishes: gui,to,ex,c
The Godfather: god,,,
War and Peace: war,an,pe,

To find a book using AUTHOR/TITLE:

1. Make sure blinking square (cursor) is at top left corner of terminal screen. To move cursor to correct starting position, tap "Home" key.
2. Type in first four letter of author's last name.
3. Type in a comma.
4. Type in first four letters of first word of title (exclude a, an, the). You may enter fewer letters if first word of title does not contain four letters.

If computer replies: "Please log-in," do the following:

Type in the following: 000-00-0000

Then tap key marked SEND. After you are logged-in, you may use the terminal to look for books.

5. Tap key marked DISPLAY REC'D, then tap key marked SEND.

An AUTHOR/TITLE search should look like this XXXX,XXXX (X's are the letters you typed).

Examples: Michener's Centennial: mich,cent
 Tolstoy's War and Peace: tols,war
 Churchill's Closing the Ring: chur,clos
 Rust Hill's How to Retire at Forty-One: hill,how

To find the works of an AUTHOR

1. Make sure blinking square (cursor) is at the top left corner of terminal screen. To move cursor to correct starting position, tap "Home" key.
2. Type in first four letters of author's last name.
3. Type in a comma.
4. Type in first three letters of author's first name.
5. Type in comma.
6. Type in middle initial (if known).
7. Tap key marked DISPLAY REC'D, then tap key marked SEND.

An AUTHOR ONLY search should look like this: XXX,XXX,X (X's are the letters you typed).

Examples: Jules Verne: vern,jul
 Winston Leonard Churchill: chur,win,l
 Norman Mailer: mail,nor,
 P.G. Wodehouse: wode,p,g

These procedures will locate books in the computerized catalog written by the particular author you requested.

ADDITIONAL INSTRUCTIONS AND SUGGESTIONS

The screen display will sometimes have a numbered list. If this happens, simply type the numeral you wish to examine, hit DISPLAY REC'D and SEND.

If the screen display says "Screen 1 of 2," to examine the next screen simply type in "ns" and then hit the keys DISPLAY REC'D and SEND.

If the computer asks you a question, you can answer "yes" or "no" simply by typing either "yes" or "no" on the screen then tapping the key marked SEND.

IF YOU MAKE A MISTAKE WHEN TYPING, simply move blinking square to letter or space you wish to change and type in the correct character. To move cursor in any direction, tap keys marked with arrows (lower right of keyboard).

If someone before you has left information on the screen and you wish to clear the screen before you begin, simply tap the key marked CONTROL at the lower left of the keyboard and at the same time depress the button marked CLEAR on the right-hand side of the keyboard. This will clear the screen for you.

IF YOU NEED FURTHER ASSISTANCE, ASK YOUR LIBRARY STAFF - they will be glad to help you.

Partial list of Library Codes appearing at the bottom of the screen

OUN - Ohio University
TLM - Toledo Public Library
DPL - Dayton Public Library
OHI - State Library of Ohio
OSU - Ohio State University
CWR - Case-Western Reserve University
OBE - Oberlin College

The library staff hope you have enjoyed using our electronic catalog. Our terminal, along with over 440 other terminals in libraries in 30 states, is linked to a computerized catalog operated by the Ohio College Library Center, a non-profit corporation based in Columbus, Ohio.

INSTRUCTIONS FOR THE USE OF THE
CATHODE RAY TUBE TO
ADDRESS THE OCLC COMPUTER

This terminal is linked to a computerized catalog. By following easy instructions you can use the terminal to obtain information about books.

The information you will get on the terminal screen is the same as you would find in a card catalog. The terminal will also furnish you with a list of libraries that have the particular title you are looking for. This string of holding libraries appears at the end of a catalog record and consists of a three-letter symbol for each library. Your library's symbol is CWR.

Most of the books in this computerized catalog were published since 1971. For books published before 1971, you should check the library's card catalog if you cannot locate the book with the terminal.

GENERAL INSTRUCTIONS

1. In order to be authorized to use the OCLC system, you must be recognized by the computer. You may log into the system in the GUEST mode by keying in:

000-00-0000

SEND (The "Send" key is in the upper left hand section of the keyboard.)

2. Before you start a search, the CURSOR (a blinking rectangle) is at the top of the left corner of the terminal screen, or HOME POSITION. To move the cursor to home position, tap the key marked "Home" (right of the keyboard).
3. If you wish to "erase" or clear the terminal screen, depress the "Control" key (lower left of the keyboard), and at the same time, tap the key marked "Clear Page" (right of the keyboard).

To locate a book by using the TITLE ONLY

Key in: The first three letters of the first word of the title, excluding a, an, and the.
, (comma)
the first one or two letters of the second and third words and the first letter of the fourth word, separating each word segment by a comma.
DISPLAY REC'D (upper left of the keyboard)
SEND " " " " "

Note: This algorithm MUST contain three commas.

Examples: Guide to Exposed Concrete Finishes: gui,to,ex,c
The Godfather: god,,
War and Peace: war,an,pe,

To locate a book by using the AUTHOR AND TITLE

Key in: The first four letters of the author's last name.
 , (comma)
 The first four letters of the first word of the
 title (excluding a, an, and the). You
 may enter fewer letters if the first word
 of the title does not contain four letters.
DISPLAY REC'D
SEND

Note: This algorithm MUST contain one comma.

Examples: Michener's Centennial: mich,cent
 Tolstoy's War and Peace: tols,war

To find all the works of ONE AUTHOR

Key in: The first four letters of the author's last name.
 , (comma)
 The first three letters of the author's first name.
 , (comma)
 The middle initial, if known.
DISPLAY REC'D
SEND

Note: The algorithm MUST contain two commas.

Examples: Jules Verne: vern,jul,
 Winston Leonard Churchill: chur,win,1
 P. G. Wodehouse: wode,p,g

To find a book by the LIBRARY OF CONGRESS number

Key in: The Library of Congress number; include the dash and
 be careful to tap the numeral "one" rather than
 the lower case letter L.
DISPLAY REC'D
SEND

To find a book by the INTERNATIONAL STANDARD BOOK NUMBER

Key in: The International Standard Book Number, omitting all
 hyphens.
DISPLAY REC'D
SEND

ADDITIONAL INSTRUCTIONS AND SUGGESTIONS

The screen display will sometimes have a numbered list of all the entries that conform to the algorithm you have keyed in. If this happens, type the number of the item you wish to examine, tap DISPLAY REC'D and SEND. Example: The screen display shows twelve entries and you wish to see the seventh.

Key in: 7 (seven)
DISPLAY REC'D
SEND

If the record is too long to fit on one screen, the screen display will say "Screen 1 of 2" at the beginning of the record. To see the second screen

56

Key in: ns (next screen)
DISPLAY REC'D
SEND

If you wish to reexamine the first screen

Key in: ps (previous screen)
DISPLAY REC'D
SEND

If the computer asks you a question, you can answer "yes" or "no" by typing either "yes" or "no" on the screen and tapping the key marked "SEND".

IF YOU MAKE A MISTAKE WHEN TYPING, move the cursor to the letter or space you wish to correct and type in the proper character. To move the cursor around the screen, tap the keys marked with arrows on the lower right of the keyboard.

IF YOU NEED FURTHER ASSISTANCE, ASK YOUR LIBRARY STAFF; they will be glad to help you.

Partial list of Library Codes appearing at the bottom of the screen

OUN - Ohio University
TLM - Toledo Public Library
DMM - Dayton Public Library
OHI - State Library of Ohio
OSU - Ohio State University
KSU - Kent State University
CSU - Cleveland State University
OBE - Oberlin College

There is a more complete list of holding libraries next to the terminal.

This terminal is linked to a computerized catalog operated by the Ohio College Library Center (OCLC), a non-profit corporation based in Columbus, Ohio.

Name of Library

Library Symbol

Northeastern Ohio Libraries

CHS Cleveland Health Sciences Lib., Cleveland
CSU Cleveland State University, Cleveland
CWR Case Western Reserve University, Cleveland

GEC Geauga County Public, Chardon
HIR Hiram College, Hiram
KSU Kent State University, Kent

LAP Lakewood Public Library, Lakewood
LEC Lake Erie College, Painesville
OBE Oberlin College, Oberlin, Ohio
SHP Shaker Heights Public Library, Shaker Heights

Ohio Libraries

AKR University of Akron, Akron
ANC Antioch College, Yellow Springs
BGU Bowling Green State University, Bowling Green

CIN University of Cincinnati, Cincinnati
CNC Central State College, Wilberforce
DAY University of Dayton, Dayton
DNU Denison University, Granville

HEI Heidelberg College, Tiffin
HUC Hebrew Union College, Cincinnati
KEN Kenyon College, Gambier
MCL Medical College of Ohio at Toledo, Toledo

MIA Miami University, Oxford
MSC Muskingum College, New Concord
ONU Ohio Northern University, Ada
OSU Ohio State University, Columbus

OUN Ohio University, Athens
OWU Ohio Wesleyan University, Delaware
TOL University of Toledo, Toledo
WBU Wilberforce University, Wilberforce

WOO College of Wooster, Wooster
WSU Wright State University, Dayton
XAV Xavier University, Cincinnati
YNG Youngstown State University, Youngstown

Other Libraries

BOS Boston University, Boston, Mass.
COO Cornell University, Ithaca, New York
CPL Carnegie Library, Pittsburgh, Pennsylvania
DRB Dartmouth College, Hanover, New Hampshire

DXU Drexel University, Philadelphia, Pennsylvania
FSK Fisk University, Nashville, Tennessee
PAU University of Pennsylvania, Philadelphia, Penn.

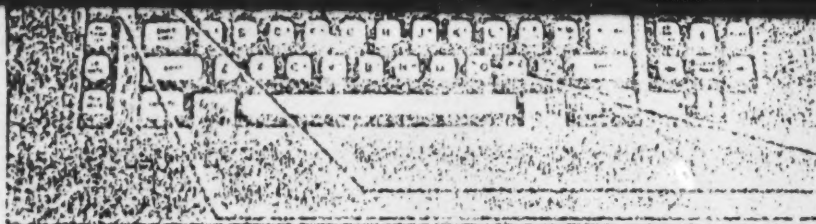
RRR Rochester University, Rochester, New York
SYB Syracuse University, Syracuse, New York
TEU Temple University, Philadelphia, Pennsylvania
YUS Yale University, New Haven, Connecticut

Case Western Reserve University

Guide for Operation of the OCLC Terminal




 CASE WESTERN RESERVE UNIVERSITY
 CLEVELAND, OHIO 44106



Keyboard

comma

SEND

DISPLAY RECORD

Instructions for Operating the OCLC terminal

The OCLC terminal will be ON and ready for use each morning. In order to operate the system the user will

TO BEGIN: *tap the figures 000-00-0000 (use numerical zero) including the dashes
*tap the key labeled SEND (located on the keyboard) to the left of the letter O)

NOTE: The computer will respond by displaying "Good morning (afternoon) Guest." You are now ready to ask the computer for bibliographic information

SEARCH by AUTHOR If you wish to inquire about a book and know its **AUTHOR & TITLE** key in:

- *first three letters of author's last name
- *, (comma)
- *the first three letters of the first key word of the title (ignore the articles "A, An, The," however, include foreign language articles)
- *tap DISPLAY RECORD (i.e. DISPLAY RECORD)
- *tap SEND

EXAMPLE: A book by John O'Brien, *The Co-op in Sweden* is keyed

ALGORITHM: o b r e o o

NOTE: It is immaterial to the system whether upper and lower case characters are used or all upper case or all lower case

The last two steps, DISPLAY RECORD and SEND, instruct the computer to transmit a reply. While the computer is processing the request, the keyboard is locked and cannot be operated.

In a few seconds the terminal will display the information usually found on a catalogue card.

The bottom line of the bibliographic information contains the symbols of the libraries which hold the material, e.g. CWR (Case Western Reserve University), YUS (Yale University), etc. There are about 200 participating libraries, each with a different symbol. Some library symbols are listed on the back of these instructions

SEARCH by TITLE If you don't know the author you may be able to retrieve the information by use of just the **TITLE** Key in:

- *first three letters of the first key word (exclude "A, An, The") of the title
- *, (comma)
- *initial letters of the next three words of the title, including articles and subtitles, with a comma between each letter. The total algorithm MUST contain THREE commas
- *tap DISPLAY RECORD
- *tap SEND

EXAMPLE: For the title: *Merchants, Farmers and River Gods*. Key:

ALGORITHM: m e r , f a r

EXAMPLE: Title: *The Godfather*

ALGORITHM: g o d , ,

SEARCH by AUTHOR The author search will become operational in 1975. All the works of an author contained in the data base may be retrieved by keying in:

- *first four letters of author's last name
- *, (comma)
- *first three letters of author's first name
- *, (comma) Use comma even if there is no middle name
- *first letter of middle name, if known
- *tap DISPLAY RECORD
- *tap SEND

EXAMPLE: Author: James G. Thurber

ALGORITHM: thurjamg

EXAMPLE: Author: Ralph Waldo Emerson, emeralw

EXTENDED SEARCH: If there are more entries for Ralph Waldo Emerson (or any other algorithm) than will fit on one screen, the top line of the message will read "Screen 1 of 2." If the information is not on the first screen, you may get the next screen by keying in:

- *ns (next screen)
- *tap DISPLAY RECORD
- *tap SEND

NOTE: If you don't see the information on the second screen and you would like to check the first screen again, key in:

- *ps (previous screen)
- (instead of "ns" and follow preceding procedure)

NOTE: All entries for the algorithm will appear on the screen and they will be numbered.

If you see the entry you want, key in:

- *the corresponding number
- *tap DISPLAY RECORD
- *tap SEND

NOTE: If there are more than 50 entries for an algorithm the screen will display that information and will ask "Do you wish to continue this search?" "YES or NO"

- *if "yes," tap the letters y e s
- *tap SEND

If you do not wish to continue the search

- *tap the letters e n d
- *tap SEND

OR continue the search with another algorithm

NOTE: If you choose YES the computer will display up to 256 entries of which you will choose the correct one (try. (See Extended Search above). If there are over 256 entries, the computer will display "REQUEST IMPOSSIBLE," and you must try another approach. When you have finished using the terminal, you must sign off by keying in:

- *the letters o n d
- *SEND

OTHER SEARCHES

It is also possible to retrieve bibliographic information on the OCLC terminal if you know the Library of Congress Card Number (different from the catalogue number), the International Standard Book Number (ISBN) or the International Standard Serials Number (ISSN). Additionally, searches can be made by Mail Entry. Patrons who know this information may consult the Master Manual located near the OCLC terminal to obtain the correct form for the algorithm or may seek the assistance of a library staff member.

ERRORS

If you have made a mistake in the algorithm and wish to make a correction, place the blinking cursor on the unwanted character. The blinking cursor may be moved by depressing the key bearing an arrow pointing in the direction the user wishes it to move. When the cursor is on the unwanted character it will be erased. Then tap the correct key and continue.

If you wish to clear the screen, depress the CONTROL key and the CLEAR PAGE key simultaneously. However, if the computer has begun to respond, the screen will not clear. In this instance, allow the computer to respond and then begin your search again.

NEED HELP? Staff members of University libraries will provide any assistance needed for operating the OCLC terminal.

PLEASE ENTER COMPLETE DATE IN UPPER RIGHT CORNER OF THE CRT LOG SHEET AT THE TIME THE LOG SHEET IS PLACED AT THE TERMINAL.

COLUMN 1 (DAY): ENTER DAY AND MONTH IN NUMERALS, E.G. 1/20, FOR THE FIRST DAY OF LOG ACTIVITY. SEVERAL DAYS MAY BE RECORDED ON A SINGLE LOG SHEET.

COLUMN 2 (HRS. AVAILABLE): REFERENCE SERVICE STAFF SHOULD SIMPLY INDICATE THE TOTAL TIME THE CRT IS AVAILABLE FOR THE DAY ON THE FIRST LINE IN THIS COLUMN FOR A GIVEN DAY.

COLUMN 3 (CLOCK TIME): THIS COLUMN SHOULD SHOW THE ACTUAL CLOCK TIME OF DAY THAT WORK AT THE CRT BEGINS AND ENDS FOR ANY SPECIFIC OPERATOR OR USER.

COLUMN 4 (DOWNTIME): A RUNNING TALLY BY LINE IN THIS COLUMN SHOULD REFLECT ANY CRT DOWNTIME IN DECIMAL PARTS OF HOURS FOR TIME IN EXCESS OF 15 MINUTES, I.E. IN EXCESS OF .25 HRS.

COLUMN 5 (HOURS USED): ENTER HOURS OR PARTS OF HOURS IN DECIMALS IN EXCESS OF 15 MINUTES, I.E. .25 HRS., ONLY IF YOU SEARCH ON THIS CRT FOR AT LEAST 15 MINUTES, E.G. 1.5, 1.25, .75 ETC.

COLUMN 6, 7 & 9 (KINDS OF SEARCHES): ENTER A SIMPLE TALLY MARK HERE FOR EACH SEARCH, E.G. ~~HH~~ II, COUNTING EACH SEARCH KEY OPERATION AS A SEPARATE SEARCH, I.E. YOU MAY HAVE MORE THAN ONE SEARCH TALLIED FOR A GIVEN BOOK OR OTHER TYPE OF MATERIAL.

COLUMN 8 (COMMENTS): ALTHOUGH THIS COLUMN WILL SELDOM BE USED, YOU MAY WISH TO MAKE AN OCCASSIONAL COMMENT CONCERNING "RESPONSE TIME", "CONDITION OF EQUIPMENT", "PATRON REACTION", ETC.

NOTE: WHILE IT IS NOT NECESSARY TO ENTER SPECIFIC CLOCK TIMES IN COL.3 FOR PATRON SEARCHES (THESE USUALLY ONLY TAKE A FEW MINUTES), IT WOULD BE USEFUL TO LOCATE SPECIFIC PATRON SEARCH TALLY MARKS IN COL.9 ON A LINE IN APPROXIMATION TO COL.3 CLOCK TIMES ENTERED FOR VERIFICATION OR ILL SEARCHES. IN THIS WAY WE MAY BE ABLE TO JUDGE PEAK ACTIVITY FOR PATRON SEARCHES.

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CRT Searching Procedure

1. Turn on switch until cursor can be seen in upper left corner of screen.
2. Log in using "guest number" 000-00-0000. Depress "send" key. Message will appear on top of screen "good morning , or good afternoon, guest"...
3. Search by one of three methods:
 - a. LC card number (if available), "display" and "send" keys depressed.
 - b. Name-title search-see next page for details.
 - c. Title search - see next page for details.

Use all three search procedures (if available) before determining that a record is not in the system. Do not use sub-titles in name-title or title searches.

The screen does not have to be cleared between searches. After "display" and "send" have been depressed cursor returns to "home" position, ie., top left corner of screen. Where a single record, on a list of truncated records occupy more than one screen "ns", "display" and "send" obtains the next screen while "ps", "display" and "send" obtains the previous screen. Holding libraries appear at the bottom of the screen.

"Keyboard lock" light will come on while computer is searching request. If it stays on longer than five minutes there is probably a problem of some kind. Should this occur during the day contact Virginia Truhar, Margaret Eastwood or Brian Ruddick. In the evening call OCLC 1-800-282-6496.

Technical Services Division staff are always glad to be of assistance in questions relating to the Reference CRT.

When caption says more than 50 entries,
and you want, then punch "yes" and "send"

NEW SEARCH KEY STRUCTURES

ATTC's Research and Development Division expanded search key structures for name-title and title indexes on 1-2 February 1975. The new search key structures are more flexible, allowing a user to increase or restrict the number of characters used in a search.

New search key structures and examples follow, along with some general suggestions for achieving optimal use from the expanded structures.

INDEX FILE	SEARCH KEY STRUCTURE	FILES INDEXED
Name-title	4,4; 4,3; 3,4; 3,3	100,245 * a 110,245 * a 111,245 * a 130,245 * a
Title	3,2,2,1; 3,2,1,1 3,1,2,1; 3,1,1,1	245 * a

Search key characters consist of English letters a-z and numerals 0-9.

Each type of search must contain a specific number of commas. A name-title search requires one comma. A title search must have three commas even if the title does not contain four words.

By inserting a circumflex in a segment of a search key structure where the number of characters vary, a user signals the system that a complete name or title word is shorter than the maximum length. For example, a name-title search key consisting of smit,tax yields Smith, Tax; Smith, Taxable; and Smith, Taxonomy. But insertion of a circumflex (to indicate that a title word is shorter than the maximum length of the segment) results in a more specific search: smit,tax^ yields only those entries with "Tax" as the first word of title.

Name-Title Search

Structure: 4,4; 4,3; 3,4 3,3

A name-title search key consists of the first three or four letters of the first word of the name entry, followed by a comma, and the first three or four letters of the first non-English-article word of the title. A name-title search uses only one comma.

The name-title search keys for James Michener's Centennial are: mich,cent; mich,cen; mic,cent; mic,cen.

A search key structure of ott,fede yields David Ott's Federal Budget Policy and Miriam Ottenberg's The Federal Investigators. However, ott^,fede yields only David Ott's Federal Budget Policy. In this instance, a surname was shorter than the maximum segment; a circumflex restricted the name segment to the first three letters.

Title Search - Subfield a (short title) Only

Structure: 3,2,2,1; 3,2,1,1; 3,1,2,1; 3,1,1,1

A title search key consists of the first three letters of the first non-English-article word of the title, followed by: a comma, the first one or two letters of next word of title, comma, first one or two letters of next word, comma, and first letter of next word. Three commas are necessary for a title search regardless of the number of words in a title.

The search keys for George H. Daniels' American Science in the Age of Jackson are:

3,2,2,1 -- ame,sc,in,t; 3,2,1,1 -- ame,sc,i,t; 3,1,2,1 -- ame,s,in,t; and 3,1,1,1 -- ame,s,i,t

The title search key for Mario Puzo's The Godfather is god,,

-2-

TO ACQUIRE SPIVAS TERMINALS, SPARE PARTS

OCIC purchased eighty Spivas LITE terminals and a large stockpile of spare parts from Spivas Systems, Inc. before that company ceased operations on 31 January 1975. Spivas manufactured the first model of cathode ray tube terminals used on OCIC's on-line system.

Institutions may purchase Spivas LITE terminals from OCIC at a price of \$1500.00 each. However, OCIC can support Spivas terminals for an indefinite time in the future. OCIC will gradually phase out Spivas terminals as they become either nonrepairable or too costly to repair.

TRUSTEES ESTABLISH SERIALS CHECK-IN CHARGE

The OCIC Board of Trustees approved charges for serials check-in on the OCIC system on 12 February 1975. The Board set charges of 8 cents for each issue of a journal checked-in in an Ohio library and 3.4 cents for libraries participating with regions that have arranged for institutions to purchase terminals and pay for telephone lines. Libraries paying annually in advance will receive a six percent discount.

SEARCH KEY STRUCTURE FOR AUTHOR INDEX

OCIC's Research and Development Division installed a personal name index file in OCIC's data base on 10 February 1975. Ohio University tested the new index file on-line in regular operation, and the personal name file is now available to participating libraries. Search key structures for the personal name index will enable users to retrieve works by a particular author in the data base.

Search key structures for the personal name index file (100 field) are:

4,3,1; 4,2,1; 4,1,1; 4,3,8; 4,2,8; 4,1,8

Search key characters consist of English letters a-z and numerals 0-9.

A personal name search key consists of the first four letters of the author's surname, followed by a comma, the first three (if known) letters of the forename, a comma, and the middle initial (if known). A personal name search key contains two commas.

The search keys for George H. Daniels are: 4,3,1 -- dani,geo,h; 4,2,1 -- dani,ge,h; 4,1,1 -- dani,g,h; 4,3,8 -- dani,geo,; 4,2,8 -- dani,ge,; 4,1,8 -- dani,g,.

To restrict a variable segment of the search key structure to fewer than the maximum number of characters, insert a circumflex. Compare the following search key structures:

4,1,8 -- cohe,i, yields: I Bernard Cohen, I. K. Cohen, Ira A. Cohen, Ira S. Cohen, Irving B. Cohen, Israel Cohen, Itamar Cohen and Iva Cohen

4,3,8 -- cohe,ira, yields: Ira Cohen

4,1^,8 -- cone,i^, yields: I Bernard Cohen

To retrieve items in data base by author, key in one of the above search key structures, depress DISPLAY REC'D and then SEND.

3,2,2,1

ISBN, ISSN AND CODEN FILES AVAILABLE FOR SEARCHING

OCIC's Research and Development Division installed index files in the data base for International Standard Book Number (ISBN), International Standard Serial Number (ISSN), and CODEN on 24 March 1975. Search-key structures and examples for the new index files follow.

<u>Index File</u>	<u>Search Key Structure</u>	<u>Fields Indexed</u>
ISBN	nine or ten-digit number	020, 4 a
ISSN	an eight-digit number with a hyphen between fourth and fifth digits	027, 4 a
CODEN	five or six characters	030, 4 a

ISBN

Designated agencies in countries that publish books assign International Standard Book Numbers, giving each book a unique identification number. An ISBN is a nine or ten-digit number which may end with the alphabetic character "X". An ISBN usually appears on the verso of the title page.

<u>Examples:</u>	<u>ISBN</u>	<u>Search Key Structure</u>
	0-08-003312-1	0080033121
	0-8369-0026-X	083690026X

To use an ISBN search key, type on the terminal keyboard the ISBN of the item, omitting hyphens and including "X" character, if any; depress DISPLAY REC'D, then SEND.

ISSN

The International Standard Serial Number is a distinctive identification number assigned to a serial title by the International Serials Data System. The ISSN is an eight-digit number with a hyphen between the fourth and fifth digits. Users should enter a search key for an ISSN exactly as the ISSN appears on an item.

<u>Examples:</u>	<u>ISSN</u>	<u>Search Key Structure</u>
	0550-029X	0550-029X
	0069-7184	0069-7184

To use an ISSN search key, type on the terminal keyboard the ISSN of the item, including hyphen and alphabetic characters, if any; depress DISPLAY REC'D, then SEND.

CODEN

CODEN is another unique identifier for a serial title. CODEN designation is assigned by the American Society for Testing and Materials and is based on the title of the work. A CODEN search key contains either five or six characters. The final character of a CODEN is a "check" digit that is either an alphabetic or numeric character. Use of final character (check digit) is optional in construction of a CODEN search key.

<u>Examples:</u>	<u>CODEN</u>	<u>Search Key Structure</u>
	ASIRAF	ASIRA
	ASIRAF	ASIRAF
	KKKIAI	KKKIAI

To use a CODEN search key, type on the terminal keyboard the first five or six characters of CODEN for the item; depress DISPLAY REC'D, then SEND.

Keyboard

comma

SEND

DISPLAY RECORD

The OCLC terminal will be ON and ready for use each morning. In order to operate the system the user will:

TO BEGIN:

*tap the figures 000-00-0000 (use numerical zero) including the dashes

*tap the key labeled SEND (Located on the keyboard) to the left of the letter Q)

NOTE:

The computer will respond by displaying "Good morning (afternoon) Guest." You are now ready to ask the computer for bibliographic information.

SEARCH by AUTHOR & TITLE

If you wish to inquire about a book and know its AUTHOR & TITLE key in:

*first three letters of author's last name

*, (comma)

*the first three letters of the first key word of the title (ignore the articles "A, An, The," however, include foreign language articles)

*tap DISPLAY REC'D (i.e. DISPLAY RECORD)

*tap SEND

EXAMPLE:

A book by John O'Brien, *The Co-op in Sweden* is keyed:

ALGORITHM:

obr,coo

NOTE:

It is immaterial to the system whether upper and lower case characters are used or all upper case or all lower case.

The last two steps, DISPLAY RECORD and SEND, instruct the computer to transmit a reply. While the computer is processing the request, the keyboard is locked and cannot be operated.

In a few seconds the terminal will display the information usually found on a catalogue card.

The bottom line of the bibliographic information contains the symbols of the libraries which hold the material, e.g. CWR (Case Western Reserve University), YUS (Yale University), etc. There are about 200 participating libraries, each with a different symbol. Some library symbols are listed on the back of these instructions.

SEARCH by TITLE

If you don't know the author you may be able to retrieve the information by use of just the TITLE. Key in:

*first three letters of the first key word (exclude "A, An, The") of the title

*, (comma)

*initial letters of the next three words of the title, including articles and subtitles, with a comma between each letter. The total algorithm MUST contain THREE commas

*tap DISPLAY REC'D

*tap SEND

EXAMPLE:

For the title: *Merchants, Farmers and River Gods*. Key:

ALGORITHM:

mer,f,a,r

EXAMPLE:

Title: *The Godfather*

ALGORITHM:

god...

SEARCH by AUTHOR

The author search will become operational late in 1974. All the works of an author contained in the data base may be retrieved by keying in:

*first four letters of author's last name

*, (comma)

*first three letters of author's first name

*, (comma) Use comma even if there is no middle name

*first letter of middle name, if known

*tap DISPLAY REC'D

*tap SEND

EXAMPLE:

Author: James G. Thurber

ALGORITHM:

thur,jam,g

EXAMPLE:

Author: Ralph Waldo Emerson, emer,r,a,e

EXTENDED SEARCH:

If there are more entries for Ralph Waldo Emerson (or any other algorithm) than will fit on one screen, the top line of the message will read "Screen 1 of 2." If the information is not on the first screen, you may get the next screen by keying in:

*ns (next screen)

*tap DISPLAY REC'D

*tap SEND

NOTE:

If you don't see the information on the second screen and you would like to check the first screen again, key in:

*ps (previous screen)

(instead of "ns" and follow preceding procedure)

NOTE:

All entries for the algorithm will appear on the screen and they will be numbered.

If you see the entry you want, key in:

*the corresponding number

*tap DISPLAY REC'D

*tap SEND

NOTE:

If there are more than 50 entries for an algorithm the screen will display that information and will ask, "Do you wish to continue this search?" "YES or NO"

*if "yes," tap the letters y e s

*tap SEND

If you do not wish to continue the search

*tap the letters e n d

*tap SEND

OR continue the search with another algorithm

NOTE:

If you choose YES the computer will display up to 256 entries of which you will choose the correct entry. (See Extended Search above). If there are over 256 entries, the computer will display "REQUEST IMPOSSIBLE," and you must try another approach.

SIGN OFF

When you have finished using the terminal, you must sign off by keying in:

*the letters e n d

*SEND

OTHER SEARCHES

It is also possible to retrieve bibliographic information on the OCLC terminal if you know the Library of Congress Card Number (different from the catalogue number), the International Standard Book Number (ISBN) or the International Standard Serials Number (ISSN). Additionally, searches can be made by Main Entry. Patrons who know this information may consult the Master Manual located near the OCLC terminal to obtain the correct form for the algorithm or may seek the assistance of a library staff member.

ERRORS

If you have made a mistake in the algorithm and wish to make a correction, place the blinking cursor on the unwanted character. The blinking cursor may be moved by depressing the key bearing an arrow pointing in the direction the user wishes it to move. When the cursor is on the unwanted character it will be erased. Then tap the correct key and continue.

If you wish to clear the screen, depress the CONTROL key and the CLEAR PAGE key simultaneously. However, if the computer has begun to respond, the screen will not clear. In this instance, allow the computer to respond and then begin your search again.

NEED HELP?

Staff members of University Libraries will provide any assistance needed for operating the OCLC terminal.

INSTRUCTIONS FOR PATRON OPERATION OF CRT TERMINALS IN SEARCHING THE OCLC DATA BASE

Prepared by Patricia Jacobs Beam,
with the assistance of
Nancy F. Rubenstein and Stephanie C. Perentesis,
Heidelberg College, Tiffin, Ohio

(It is suggested that a library staff member log in on the guest no.,
000-00-0000, at the beginning of each day.)

* For additional search methods see sheets following this guide

1. Turn power switch to "on."
2. Push HOME key located on lower right hand corner of keyboard.
3. To search for a book by title ():
 - A. Ignoring the initial article (a, an, the) type the first 3 letters or numerals of the first word, then comma(,) and the first letter or numeral of each of the next three words, separating them with a comma. Leave out all punctuation marks which appear in the title. This code constitutes the search key. Push DISPLAY REC'D and then SEND key.

Examples:

The presidency of Rutherford B. Hayes	pre,o,r,b
1066 and all that	106,a,a,t
U.S. air operations in Cambodia	us,a,o,i

- B. If title is shorter than four words, 3 commas are still necessary. If the first word is less than three letters, use what letters are given.

Examples:

my memoir	my,m,,
G., by John Berger searched as:	G,,,

- C. To correct typing errors, move cursor (blinking line) directly over error and type correction. Cursor may be moved by pushing one of four arrow keys in lower right hand corner.
- D. If you receive response: "(requested title) is not in title index," go to step h.
- E. If only one record exists for the search key used, it will appear on the screen.
- F. If several books fit this search key, they will be listed on the screen(s) alphabetically by main entry in abbreviated form. To see the complete record, type the number preceeding the desired title, push DISPLAY REC'D and then SEND key. If you need to see the list of titles again, type the letters ps (previous screen), push DISPLAY REC'D and then SEND key.
- G. If the first line of the screen says "Screen 1 of 2" and you want to see screen 2, type the letters ns (next screen), push DISPLAY REC'D and then SEND key.
- H. If your request produces more than 50 books, you will be asked: "Yes or no, (requested title) produces more than fifty entries. Do you wish to continue this search?" If this happens, go to step h.

h. To search for book by author/title:

- A. Type the first three letters of the author's last name, then comma (,) and the first three letters of the first word of the title, ignoring articles (a, an, the) and punctuation. Push DISPLAY REC'D and SEND key.

Examples:

Davison, Kenneth	
The presidency of Rutherford B. Hayes.	dav,pro
D'Arcy, Martin Cyril	
Dialogue with myself	dar, dia
De La Mare, Walter	
Come hither	de,com

- B. If the author/title search produces fifty or more entries, and you do not wish to continue the search, type the word

"no" and push SEND key. If you do wish to continue the search, type the word "yes" and push the SEND key, then proceed with step 3F.

5. If our library has a copy of the book you are looking for, the the symbol HEI will appear at the bottom of the record.

IF YOU NEED HELP (III) PROCEED IMMEDIATELY TO THE NEAREST STAFF MEMBER.

See following pages for additional
search methods

NEW SEARCH KEY STRUCTURES

OCIC's Research and Development Division expanded search key structures for name-title and title indexes on 1-2 February 1975. The new search key structures are more flexible, allowing a user to increase or restrict the number of characters used in a search.

New search key structures and examples follow, along with some general suggestions for achieving optimal use from the expanded structures.

INDEX FILE	SEARCH KEY STRUCTURE	FIELDS INDEXED
Name-title	4,4; 4,3; 3,4; 3,3	100,245 * a 110,245 * a 111,245 * a 130,245 * a
Title	3,2,2,1; 3,2,1,1 3,1,2,1; 3,1,1,1	245 * a

Search key characters consist of English letters a-z and numerals 0-9.

Each type of search must contain a specific number of commas. A name-title search requires one comma. A title search must have three commas even if the title does not contain four words.

By inserting a circumflex in a segment of a search key structure where the number of characters vary, a user signals the system that a complete name or title word is shorter than the maximum length. For example, a name-title search key consisting of smi,t,tax yields Smith, Tax; Smith, Taxable; and Smith, Taxonomy. But insertion of a circumflex (to indicate that a title word is shorter than the maximum length of the segment) results in a more specific search: smi,t,tax^ yields only those entries with "Tax" as the first word of title.

Name-Title Search

Structure: 4,4; 4,3; 3,4 3,3

A name-title search key consists of the first three or four letters of the first word of the name entry, followed by a comma, and the first three or four letters of the first non-English-article word of the title. A name-title search uses only one comma.

The name-title search keys for James Michener's Centennial are: mich,cent; mich,cen; mic,cent; mic,cen.

A search key structure of ott,fede yields David Ott's Federal Budget Policy and Miriam Ottenberg's The Federal Investigators. However, ott^,fede yields only David Ott's Federal Budget Policy. In this instance, a surname was shorter than the maximum segment; a circumflex restricted the name segment to the first three letters.

Title Search - Subfield a (short title) Only

Structure: 3,2,2,1; 3,2,1,1; 3,1,2,1; 3,1,1,1

A title search key consists of the first three letters of the first non-English-article word of the title, followed by: a comma, the first one or two letters of next word of title, comma, first one or two letters of next word, comma, and first letter of next word. Three commas are necessary for a title search regardless of the number of words in a title.

The search keys for George H. Daniels' American Science in the Age of Jackson are:
3,2,2,1 -- ame,sc,in,t; 3,2,1,1 -- ame,sc,i,t; 3,1,2,1 -- ame,s,in,t; and 3,1,1,1 -- ame,s,i,t
The title search key for Mario Puzo's The Godfather is god,,,. .

Examples of Title Search

3,2,2,1 -- gui,to,ex,c yields:

- 1 Cage, Michael Terence. Guide to exposed concrete finishes
 - 2 Hollis, Stanley E. Guide to export credit insurance
- (Examples continue on page 3.)

Example of Title Search (Continued from page 2)

3,2,1,1 -- gui,to,e,c yields:

- 1 Avery, Marjorie. A guide to English Courses in the university
- 2 California. University. Center for Chinese Studies. Guide to early Chinese
- 3 Clark, George Norman. Guide to English commercial statistics
- 4 Gage, Michael Terence. Guide to exposed concrete finishes
- 5 Hogg, Garry. A guide to English country houses
- 6 Hogg, Garry. A guide to English country houses
- 7 Hollis, Stanley E. Guide to export credit insurance
- 8 Kenyon, Carleton W. A guide to early California court organization
- 9 Mathijsen, P.S.R.F. A guide to European community law
- 10 Spence, Hilda Jennings. A guide to early Canadian glass

SEARCH KEY STRUCTURE FOR AUTHOR INDEX

OCLC's Research and Development Division installed a personal name index file in OCLC's data base on 10 February 1975. Ohio University tested the new index file on-line in regular operations, and the personal name file is now available to participating libraries. Search key structures for the personal name index will enable users to retrieve works by a particular author in the data base.

Search key structures for the personal name index file (100 field) are:

4,3,1; 4,2,1; 4,1,1; 4,3,X; 4,2,X; 4,1,X

Search key characters consist of English letters a-z and numerals 0-9.

A personal name search key consists of the first four letters of the author's surname, followed by a comma, the first three (if known) letters of the forename, a comma, and the middle initial (if known). A personal name search key contains two commas.

The search keys for George H. Daniels are: 4,3,1 -- dani,geo,h; 4,2,1 -- dani,ge,h; 4,1,1 -- dani,g,h; 4,3,X -- dani,geo, ; 4,2,X -- dani,ge, ; 4,1,X -- dani,g, .

To restrict a variable segment of the search key structure to fewer than the maximum number of characters, insert a circumflex. Compare the following search key structures:

4,1,X -- cohe,i, yields: I Bernard Cohen, I. K. Cohen, Ira A. Cohen, Ira S. Cohen, Irving B. Cohen, Israel Cohen, Itamar Cohen and Iva Cohen

4,3,X -- cohe,ira, yields: Ira Cohen

4,1,X -- cohe,i^, yields: I Bernard Cohen

To retrieve items in data base by author, key in one of the above search key structures, depress DISPLAY REC'D and then SEND.

LEADING BLANKS IN 300 FIELD

Use three leading blanks at the beginning of collation in the 300 field when number of pages or number of volumes is unspecified. Placing blanks at the start of collation will allow later manual insertion of data on printed catalog cards. However, do not input leading blanks when number of pages or total volumes is present. The OCLC system retains leading blanks only in the 300 field and deletes them in other fields.

Example: 300 bbbv. 4b illus. 4c 23 cm.

INSTRUCTIONS FOR PATRON OPERATION OF CRT TERMINALS IN SEARCHING THE OCIC DATA BASE

Prepared by Patricia Jacobs Beam,
with the assistance of
Nancy F. Rubenstein and Stephanie C. Perentosis,
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LOGON: 000-00-0000 Send

1. Turn power switch to "on. 2" position.
2. Clear page if necessary — press "CLEAR" and "CONTROL" keys concurrently.
PAGE

T Title 3. To search for a book by title

Search

- A. Ignoring the initial article (a, an, the) type the first 3 letters or numerals of the first word, then comma(,) and the first letter or numeral of each of the next three words, separating them with a comma. Leave out all punctuation marks which appear in the title. This code constitutes the search key. Push DISPLAY REC'D and then SEND key.

Examples: 3, 1, 1, 1 (3 commas)

Can also use

The presidency of Rutherford B. Hayes pre,o,r,b

3, 2, 2

1066 and all that 106,a,a,t

3, 1, 2

U.S. air operations in Cambodia us,a,o,1

3, 2, 1

- B. If title is shorter than four words, 3 commas are still necessary. If the first word is less than three letters, use what letters are given.

Examples:

my memoir

my,m,,

G., by John Berger searched as:

G,,,

- C. To correct typing errors, move cursor (blinking line) directly over error and type correction. Cursor may be moved by pushing one of four arrow keys in lower right hand corner.
- D. If you receive response: "(requested title) is not in title index," go to step 4.
- E. If only one record exists for the search key used, it will appear on the screen.
- F. If several books fit this search key, they will be listed on the screen(s) alphabetically by main entry in abbreviated form. To see the complete record, type the number preceding the desired title, push DISPLAY REC'D and then SEND key. If you need to see the list of titles again, type the letters ps (previous screen), push DISPLAY REC'D and then SEND key.
- G. If the first line of the screen says "Screen 1 of 2" and you want to see screen 2, type the letters ns (next screen), push DISPLAY REC'D and then SEND key.
- H. If your request produces more than 50 books, you will be asked: "Yes or no, (requested title) produces more than fifty entries. Do you wish to continue this search?" If ~~the response is "no"~~ you wish to continue the search, type "yes" and push SEND key; continue as 3F. If not, type "no" and push SEND key.

Author/
Title
Search

4. To search for book by author/title:

- A. Type the first three letters of the author's last name, then comma (,) and the first three letters of the first word of the title, ignoring articles (a, an, the) and punctuation. Push DISPLAY REC'D and SEND key.

Examples: 3, 3 (1 comma)

Davison, Kenneth

The presidency of Rutherford B. Hayes

dav,pre

D'Arcy, Martin Cyril

Dialogue with myself

dar,dia

De La Mare, Walter

Come hither

de,com

Can also use —

4, 4

4, 3

3, 4

- B. If the author/title search produces fifty or more entries, and you do not wish to continue the search, type the word "no" and push SEND KEY. If you do wish to continue the search, type the word "yes" and push the SEND key, then proceed with step 3F.

Author 5. To search by author Search

A. Type the first four letters of the author's last name, then comma (,) and the first three letters of the author's first name, type comma (,) again. Push DISPLAY REC'D and then SEND key.

Examples: 4, 3, (two commas)

type	skin, b.,	for	B. F. Skinner
	skin, bur,		Burrhus Frederic Skinner

B. Book(s) written by the author will be displayed if there are records in the data base. If more than one item displayed, continue as 3F.

IF YOU NEED HELP, PLEASE ASK A REFERENCE LIBRARIAN.

When you finished searching, please:

- clear page — press "CLEAR" and "CONTROL" keys concurrently
- turn power switch to "on 1"

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